Version
1

Researchers Guide to Submitting to the JREB Through Submittable

JOINT RESEARCH ETHICS BOARD
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WHAT IS SUBMITTABLE?

CHAPTER
1

Submittable is the online platform used to manage ALL submissions to the Joint Research Ethics Board. Through this system, applicants will be able to complete submission forms, upload required and supplemental materials, track the status of their submission, and receive follow-up communication related to review outcomes or requested revisions.

This guide was created to help researchers complete and submit applications through the Submittable platform. It is intended to support applicants through each stage of the submission process, from accessing the correct form to uploading documents and submitting materials successfully.

Whether you are submitting for the first time or returning to the platform for an updated application, this guide provides a clear overview of what to expect and how to navigate the system.

WHO SHOULD USE THIS GUIDE?	CHAPTER 2

This guide is intended for researchers, project leads, students, staff, and other applicants who are preparing to submit to the JREB.

It may be helpful for:

- first-time applicants
- principal investigators
- student researchers submitting with supervision
- staff submitting quality improvement or program evaluation projects, if applicable
- applicants responding to requested revisions or follow-up items

If different submission types are available in your system, applicants should ensure they are selecting the form that best matches their project.

BEFORE YOU BEGIN

CHAPTER **3**

Before starting your submission, it is helpful to gather all required information and documents in advance. This will make the process smoother and reduce the chance of delays.

Depending on your submission type, you may need:

- project title
- principal investigator and study team information
- recruitment materials, questionnaires, surveys, interview guides, or data collection tools, if applicable
- supporting institutional or administrative documents, if required
- version dates and version numbers for ALL documents

Before beginning, please make sure:

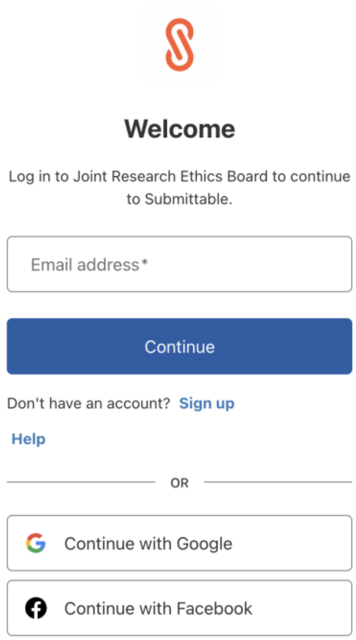
- you are using the correct submission form
- your documents are final or near-final
- you are using JREB mandated templates (protocol, consent and data management plan)
- file names are clear, easy to identify, and follow the notation outlined in the submission instructions
- all required fields and attachments are ready

**Always review submission requirements before starting to ensure you have all necessary and up-to-date materials prepared*.

CREATING OR LOGGING INTO YOUR SUBMITTABLE ACCOUNT

CHAPTER 4

1. Open this link to begin.



2. Select **Sign Up** if you are a new user, or **Log In** if you already have an account.
3. Enter your email address and create a password, or sign in using your existing credentials.
4. Once logged in, you will be taken to the submission portal.

Tip: Use an email address you check regularly. Although all communication occurs within the portal, notifications around status updates and decisions will be sent there.

ACCESSING THE CORRECT SUBMISSION FORM

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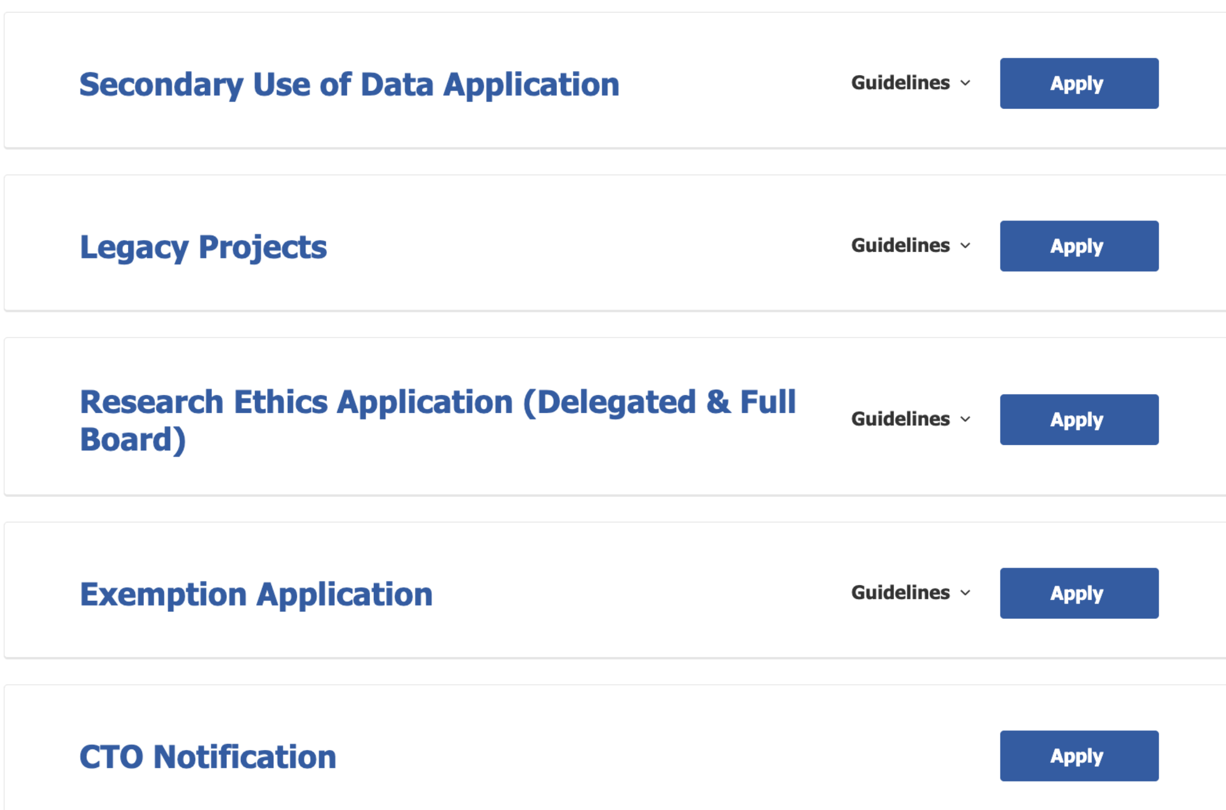
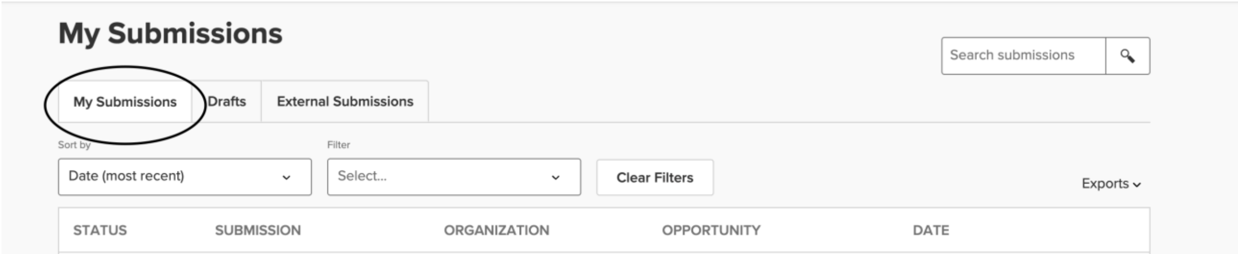
Once you have created an account, navigate to this [submission homepage]() where you will see all available submission forms. Select the form that matches the type of submission you are making.

This may include:

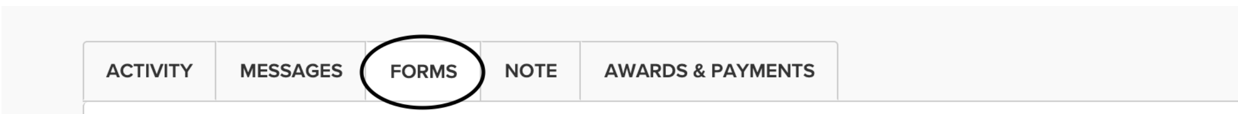
- Secondary Use of Data Application (E.g. Chart Reviews)
- Legacy Projects
- Research Ethics Application (Delegated & Full Board)
- Exemption Application
- CTO Notification



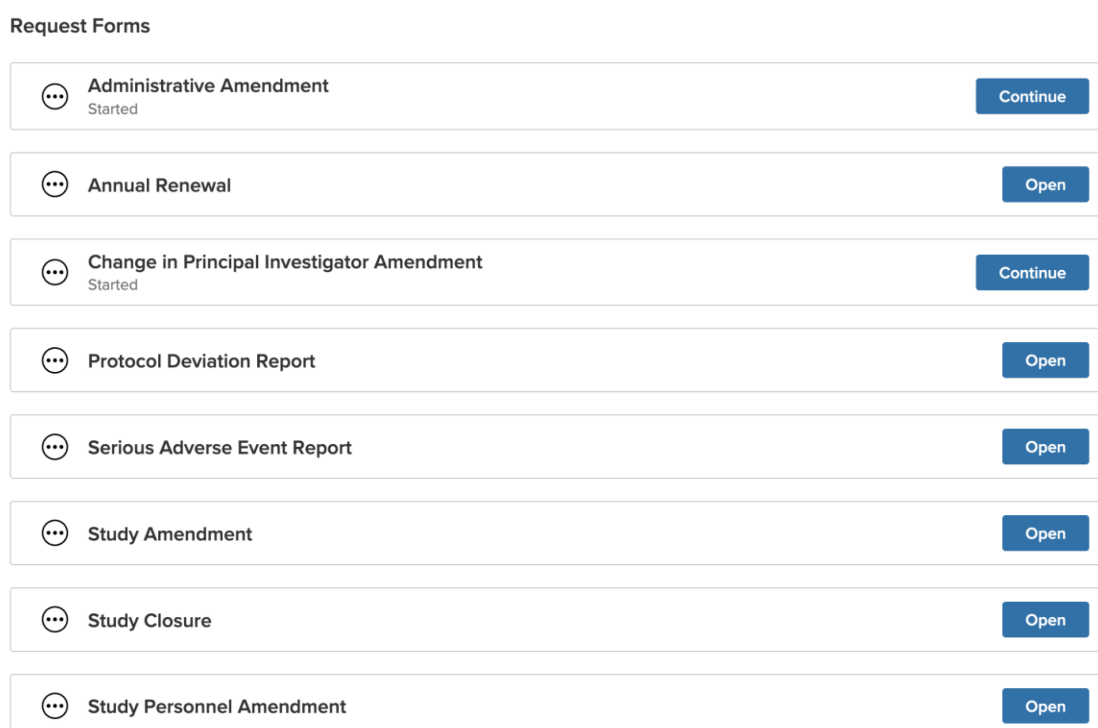
For post-approval submissions (amendments, renewals, closures, serious adverse events etc.) navigate to the **'My Submissions'** page within your portal.



Open the submission for which you would like to submit a post-approval submission, and navigate to the 'Forms' tab.



Scroll down to find the **'Request Forms'**, under which you can find all post-approval submission forms, including those previously submitted, or in-progress. Select Open to start the Request Form. Follow the instructions within and select Submit when you are finished. You can also save a draft of the Request Form, and access it from the Forms tab later.



COMPLETING YOUR SUBMISSION

CHAPTER 6

Each form will guide you through a series of questions about your project. Complete each section carefully and provide as much clarity as possible.

Fields may include information such as:

- project details
- investigator information
- risks and benefits
- data storage and management

Some questions may only appear based on your earlier responses. This is normal and helps ensure the form is relevant to your project.

The **LOCAL Principal Investigator (PI)** of the study **MUST** be the owner of the application. The owner of the application (the person who started it and added the collaborators - e.g. the LOCAL PI) is the only person who is able to submit. Once submitted, if necessary, ownership of the application may be transferred over to another PI (see page 21).

You can however invite additional people to complete this form as a collaborator by doing the following:

Click on *Manage Collaborators* in the top right corner of the submission/form you are completing.

A dialog box will appear, asking you to enter the email addresses of your collaborators.

Add one or multiple email addresses to the field where indicated. Click Enter or tab to lock the entry, then click **Invite:**

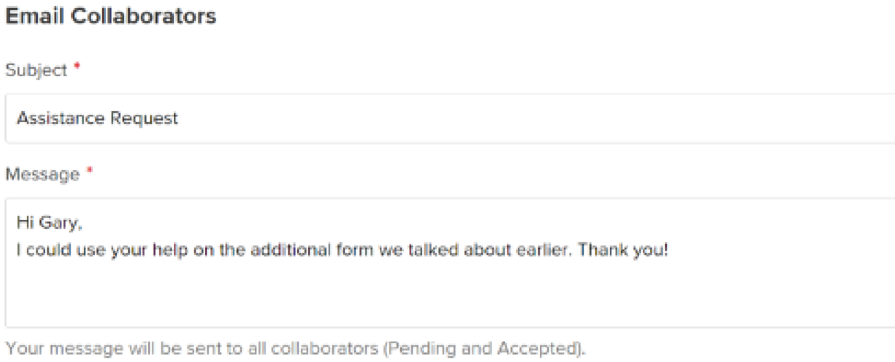
Your collaborators will receive an automated email that contains a link to the submission or form they've been added to. They will be prompted to sign in to their Submittable account (or create one if necessary). They can also return to the form later.

After you've sent invitations to collaborate, you can click on the Invite Collaborators link again anytime to see the status of your invitations. In the row for each invitee who has not yet accepted their invitation, you will see a Pending indication. There will also be a trash can next to each person's name so that the Owner of the Application can remove anyone that they no longer want to collaborate on the submission.

Tip: If your collaborators are not receiving the invitation, be sure you have the correct email address, and ask them to safelist our notification email address and check their spam folders.

Step 2: Email Collaborators

After you've invited collaborators, you can return to the **Manage Collaborators** tool to send a message to all collaborators, pending and accepted:

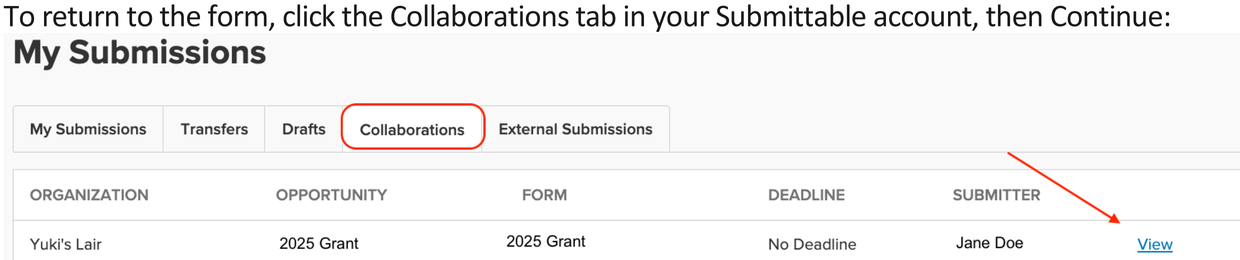


This message will go to ALL collaborators. No other parties can be included in this message, and no pending or accepted collaborators can be excluded. These messages will not be kept on the platform and cannot be accessed later.

For Collaborators
When you receive an email invitation to collaborate, click the Get Started button:

If you have a Submittable account, you will be prompted to sign in. If you don't, please take a moment to sign up with your email address and password. Once you've accessed the form, add your information and click Save Draft at the end of the form before you close it.

To return to the form, click the Collaborations tab in your Submittable account, then Continue:



Collaborators will be able to view and edit the form but **will NOT be able to submit the form.**

UPLOADING REQUIRED DOCUMENTS

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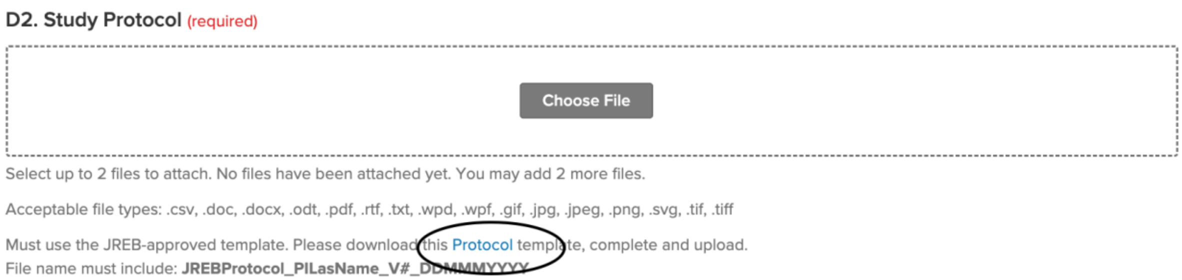
Most submissions will require you to upload supporting documents. Be sure to attach the correct files in the correct locations.

The JREB has mandated templates for the following required documents:

- Protocol
- Consent form(s)
- Data management plan

The most up-to-date versions of each of the above can be found hyperlinked within the form, right at the beginning or under the upload box.


D2. Study Protocol (required)

Choose File

Select up to 2 files to attach. No files have been attached yet. You may add 2 more files.

Acceptable file types: .csv, .doc, .docx, .odt, .pdf, .rtf, .txt, .wpd, .wpf, .gif, .jpg, .jpeg, .png, .svg, .tif, .tiff

Must use the JREB-approved template. Please download this Protocol template, complete and upload.
File name must include: **JREBProtocol_PILasName_V#_DDMMMYYYY**

If applicable to your study, you may also upload:

- Recruitment materials
- Data gathering instruments
- Communications to participants
- Other documents that will be used for your research

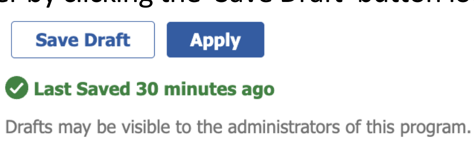
All documents must be named according to the following notation:

[document name]_PILastName_V#_DDMMMYYYY

For example:

Consent Form_Smith_v2_24-MAR-2028

If you are not ready to complete your submission in one sitting, you may save your draft and return later by clicking the 'Save Draft' button located at the bottom of the form.


Save Draft Apply

Last Saved 30 minutes ago

Drafts may be visible to the administrators of this program.

REVIEWING AND SUBMITTING YOUR APPLICATION

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1. **Review all sections of the form for completeness and accuracy.**
2. **Confirm that all required questions have been answered.**
3. **Check that all required documents have been uploaded.**
4. **Ensure that file names, version numbers, and version dates are correct.**
5. **Select Submit when you are ready.**

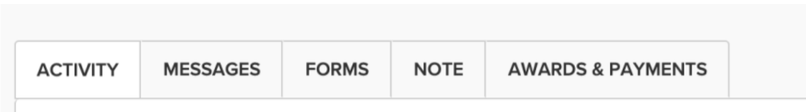
Reminder: Only the owner of the application (LOCAL PI) is able to submit the application.

After submitting, you should receive a confirmation message on screen and by email. Please note that submission does not necessarily mean review is complete. You may be contacted if clarification, revisions, or additional materials are needed.

AFTER YOU SUBMIT

CHAPTER 9

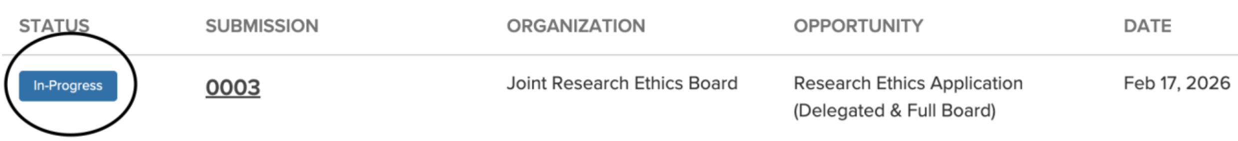
After submission, your application will be received through the system and processed according to the applicable review pathway. When you log into your account, your submissions will be listed under the ‘Submissions’ tab. Click on a submission to see activity, messages, submission content, or to add notes.



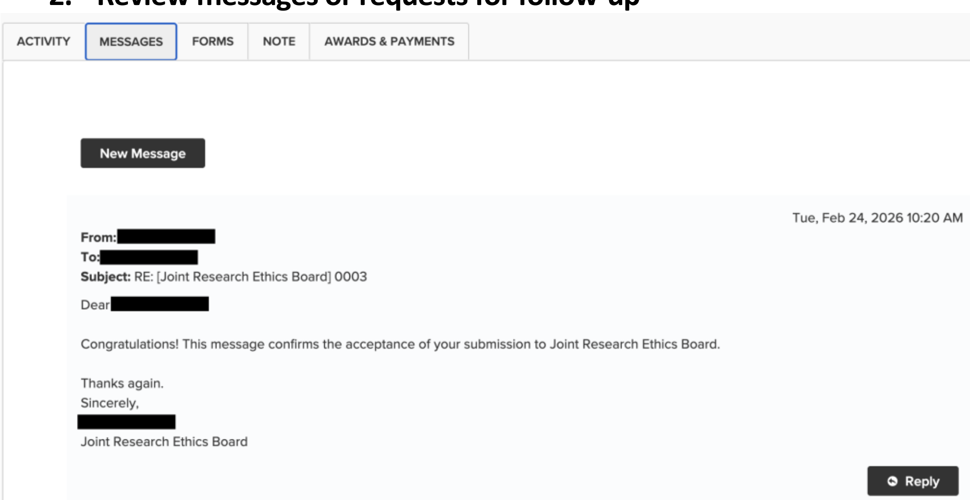
Applicants may log back into the portal to:

1. **View the status of their submission**

The status of your submission is listed to the left of your submission title when you log in to your account.

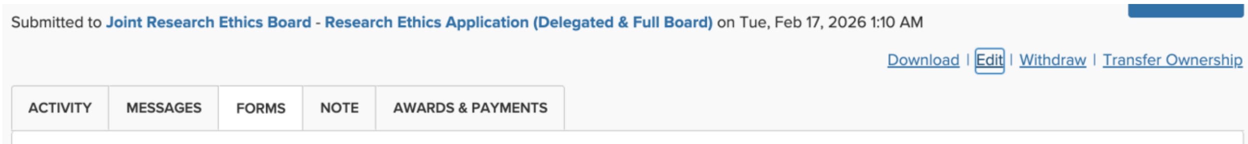


2. **Review messages or requests for follow-up**

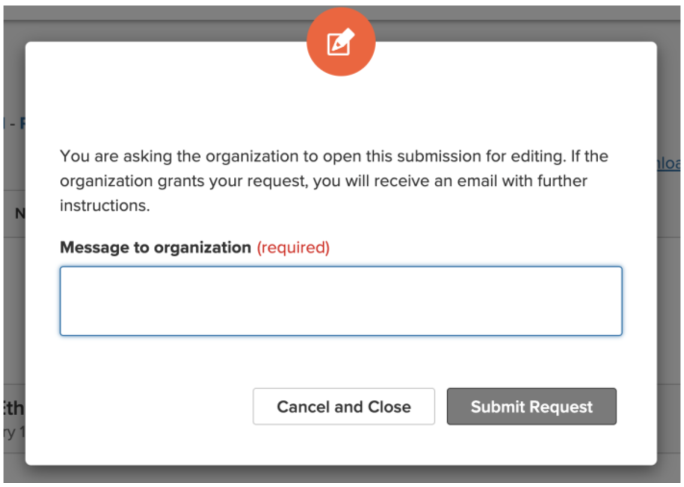


3. Upload revised documents, if requested

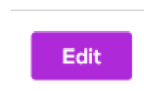
See page 15 for more details. Go to your submissions list and locate your submission. Click its title or number to open. You will see an "Edit" link in the top right corner of the page.



Click the **Edit** link to submit your request to the administrative team to begin editing.



Once the administrative team approves your request, you will receive an email letting you know your submission has been opened for editing. You can then open the submission that is now marked

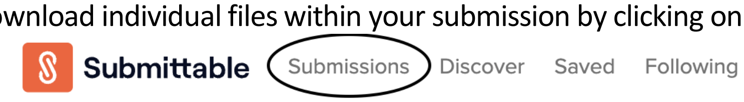


Editable by clicking the title, going to the 'Forms' tab and clicking the purple Edit button to open the submission and make your changes.

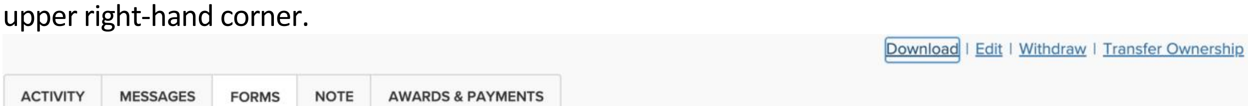
Be sure to resubmit the form at the end when you're done.

4. Keep a record of your submission

You can download a summary of any of your submissions from your submission's details page, or download individual files within your submission by clicking on **Submissions** at the top of your page.



In your 'My Submissions' list, find the submission you want to download. Click on the submissions title and open up the submission's details page where you can click the **Download** button in the upper right-hand corner.



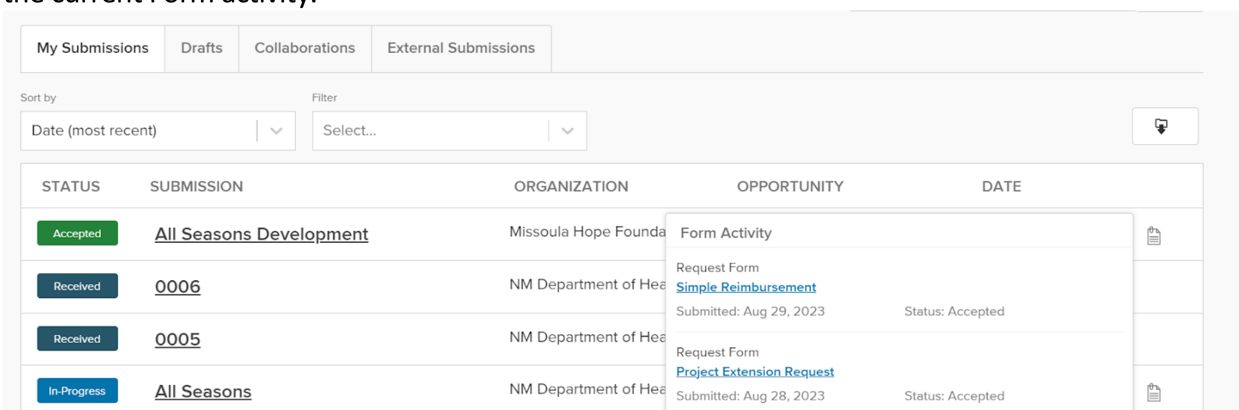
When you click Download, a .PDF summary of your submission will be downloaded to your computer.

If you wish to download individual files from within your submission, scroll through the submission until you find the file you want to download, then hover over it and you will see a download icon appear. Click the icon and that file will download to your computer.

5. Track the Progress of Request Forms (Amendments, Renewals, etc.)

Once you have submitted your Request Form, the JREB will either Accept, Decline or ask for more information. You will receive an email notification when the decision is reached.

You can track the progress of your Request Forms from your account through the **My Submission** tab. Submissions with activity will be marked with a clipboard icon. Select the icon to see a list of all the current Form activity.



Here you can see all the Request Forms and their status, as well as complete any Request Forms that you have saved as a draft.

Title	Submission Date	Status
Simple Reimbursement	Aug 29, 2023 9:57 AM	Accepted
Project Extension Request	Aug 28, 2023 10:19 AM	Accepted
Project Extension Request	Aug 22, 2023 2:07 PM	Accepted
Simple Reimbursement	Aug 22, 2023 1:40 PM	Declined

Collaborate on Request Forms

If the project you are submitting to has Collaboration enabled, you can collaborate on Request forms.

RESPONDING TO REVISION REQUESTS OR FOLLOW-UP ITEMS

CHAPTER

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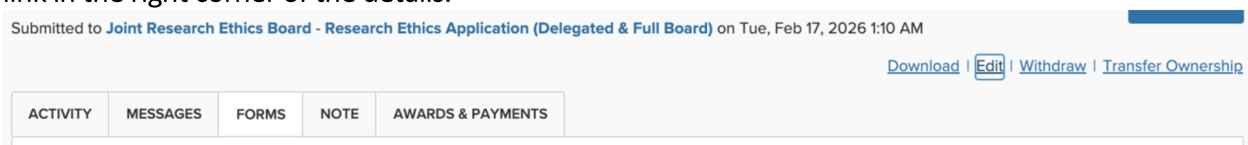
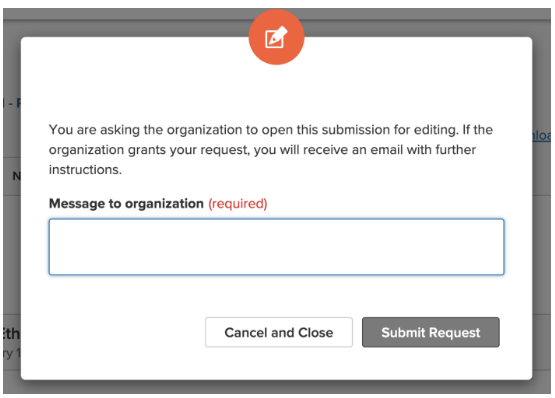
If revisions or clarifications are requested, you will be notified via the portal. To respond, go to your submissions list and locate your submission. Click on its title or number to open. You will see an Edit link in the right corner of the details.



If your submission isn't already Editable, click the **Edit** link to submit your request to begin editing.



Once we approve your request, you will receive an email letting you know your submission has been opened for editing. You can then open the submission that is now marked Editable by clicking the title, going to the 'Forms' tab and clicking the purple Edit button 

to open the submission and make your changes.

When responding:

- read the request carefully
- address each comment fully
- upload both **tracked and clean versions** of all documents with **updated version numbers and dates**

Be sure to resubmit the form at the end when you're done.

Tip: It can be helpful to keep a separate response document that clearly explains how each requested change was addressed.

TIPS FOR A SMOOTH SUBMISSION

CHAPTER 11

To help avoid delays, keep the following in mind:

1. Use the correct submission form.
    a. If you are unsure what submission form to use, contact your local JREB Coordinator.
2. Make sure your responses are clear and complete.
3. Keep information consistent across the form and all attachments.
4. Upload the correct version of each document.
5. Include version numbers and dates on submitted files.
6. Review everything carefully before submitting.
7. Check your email or the portal regularly after submission.

FREQUENTLY ASKED QUESTIONS

CHAPTER 12

WHAT NOTIFICATIONS SHOULD I EXPECT TO RECEIVE?

As an applicant, you may receive notifications for the following events related to any submissions you've made. These notifications will always be sent to the email address associated with your account.

Expected Notifications

ACTION	NOTIFICATION?
Account created	Yes
Submission successfully submitted	Yes
Submission status changes (i.e., Accepted, Declined Completed)	Yes
Additional form requested	Yes
Additional form opened for editing	Yes
Organization closed additional form for editing	Yes
Submitter finished editing (closed) additional form	Yes
Additional form rescinded	Yes
JREB replied to a message	Yes
Additional form reminder	Yes
Draft submission reminder	Yes
JREB shared reviews with submitter	Yes

Note: Collaborators who have been invited to work on a submission will receive an email notification when the collaborative submission is initially submitted, as well as any submission-related messages in which they've been included as addressee. However, collaborators will not receive any other notifications.

I RECEIVED A REQUEST TO COLLABORATE ON SUBMITTABLE. WHAT'S NEXT?
Use the link provided in the email you received to begin collaborating on the form. If you do not yet have a free Submittable account, you will first need to set one up.

The collaboration feature allows teams to collaborate together in real-time. The initials in the top right corner of the form indicate who is actively working on the form. You can also see field presence throughout the form if someone is filling out a particular field.

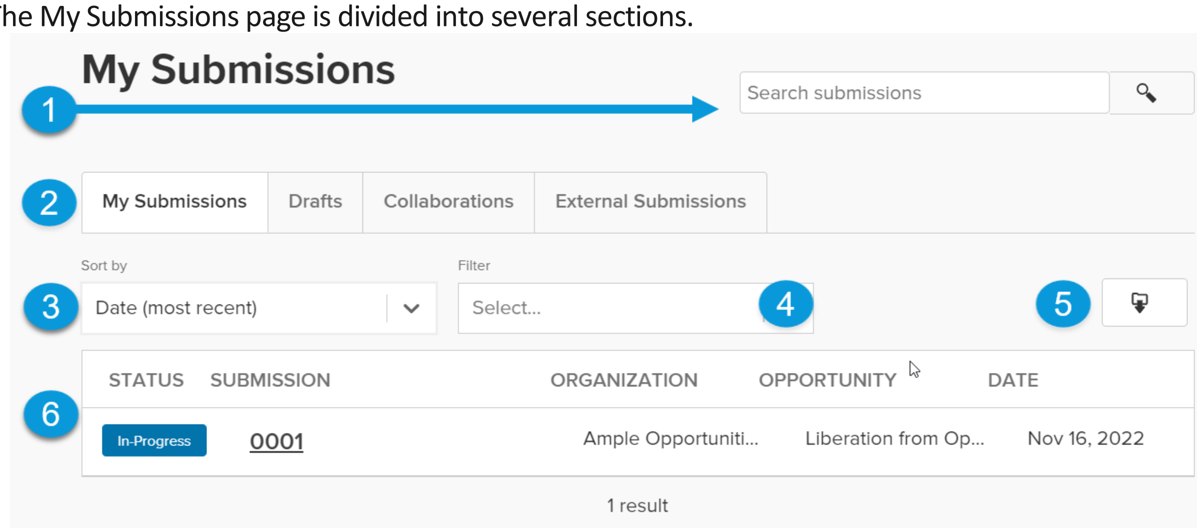
HOW DO I VIEW, MANAGE, OR COMPLETE A SUBMISSION?

The My Submissions page lets you manage your submissions, complete saved drafts, respond to collaboration requests, and enter external submissions.

Opening the My Submissions Page

1. Log into your Submittable account.
2. Click on the Submissions tab at the top of the screen.
3. The browser will take you to the My Submissions page.

The My Submissions page is divided into several sections.



1. Search Submissions toolbar

Search through your submissions by submission title, organization name, opportunity name, or date.

2. Submission Category tabs

The My Submissions page is subdivided into different categories. **My Submissions** shows all completed submissions, **Drafts** displays the submissions you saved, **Collaborations** shows the collaboration requests, and **External Submissions** lets you manually input submissions made outside of the Submittable system.

3. Sort by menu

Select the **Sort By** menu to change the order of the submissions displayed in the Submission view.

4. Filter menu

Select the Filter drop-down menu to limit the Submission View by the status of your submissions. For more information on submission status, see **My Submissions Tab** below.

5. Download icon

Click the Download icon to save a .csv file of all of the currently displayed submissions in the Submission View.

6. Submission view

The Submission View shows all of your submissions, both active and completed. Here you can see the status of the submission and submission number, as well as the Organization, Project name, and date. For more information on the Submission view, see **My Submissions Tab** below.

My Submission tab

When the My Submissions tab is active, the Submission view will list all completed submissions, along with any of the following statuses:

- **Received:** Your submission has been successfully sent to the organization and is awaiting review.
- **In-Progress :**Your submission has been received and is currently under review.
- **Declined:** Your submission has been declined.
- **Accepted:** Your submission has been accepted.
- **Completed:** Your submission has been processed and is no longer being considered.
- **Withdrawn:** Your submission has been withdrawn from consideration.

To view, edit, or otherwise interact with a submission, click the name or number of the submission. You will be taken to the **Submission Details** page. For more information, see the Submission Details page.

Drafts tab

When the Drafts tab is active, the Submission view will list all saved submission drafts. Saved drafts are incomplete submissions or submissions not yet sent to the organization. The drafts are listed by Organization, Opportunity, and Due Date (if applicable).

Save drafts can be Continued or Withdrawn. Selecting **Continue** will open the submission at the last point you saved it. Selecting **Withdraw** will delete your draft.

Collaborations tab

When the Collaborations tab is active, the Submission view will list all submissions that have a collaboration request. Collaboration requests give you the option of contributing to an existing submission that another person started. For more information, please see pages 9, 10 & 18.

Reviews Tab

If Shareable Reviews feature is enabled, the Reviews tab will appear. This lets you see the results of your submission in detail, along with comments from the reviewers.

External Submissions tab

When the External Submission tab is open, the Submission view will list all of the submissions you have entered manually. The JREB does not currently use this feature.

CAN I TRANSFER OWNERSHIP OF SUBMISSIONS?

Under certain circumstances, you may wish to transfer ownership of a submission to another individual. This is most often necessary due to a change or move of the local PI.

To transfer a submission from your account, follow the steps outlined here.

CONTACT INFORMATION

CHAPTER

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For questions about submission requirements, application forms, or requested revisions, please contact our office before submitting or as soon as possible after identifying an issue